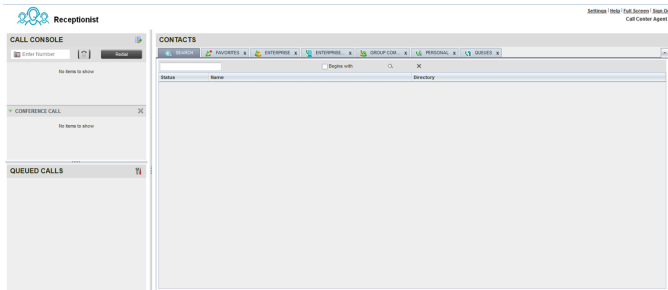


RECEPTIONIST



Managing Calls

Dial Contact

1. In the *Contacts* pane, expand the target directory.
2. Click the contact and then click **CALL** for that contact.
3. To dial an extension, click **EXT**, or to dial a mobile number, click **MOB**. The call appears in the *Call Console*.

Dial Ad Hoc Number

In the *Dialer*, enter the number and click **Dial** .

Redial Number

Up to 10 previously dialed numbers are available.

1. In the *Dialer*, click **Redial**. A list of recently called numbers appears.
2. From the list, select the number to call.

View Current Calls


Your current calls are always visible.

To display the details of the conference call, click the **Expand**

 button in the *Conference Call* panel.

Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.

In the *Call Notification* pop-up window that appears when you receive a call, click **Add vCard** .

Answer Call

In the *Call Console*, move the mouse over an incoming call and then click **ANS** for that call.

Hold Call

In the *Call Console*, move the mouse over the call and then click **HOLD** for that call.

Note: This function is not available from a remote office.

Resume Call

In the *Call Console*, move the mouse over the call and then click **ANS**.

Note: This function is not available from a remote office.

End Call

In the *Call Console*, click **END**  for the call to end. The call is removed from the *Call Console*.

Blind Transfer

Calls can be blind transferred while active, held, or ringing (in).

1. In the *Call Console*, select the call to transfer.
2. To transfer the call to an ad hoc number, enter the number in the *Dialer* and then click **Transfer**.
3. To transfer the call to a contact, click a contact in one of the *Contacts* directories and then click **TXR** for that contact.

Supervised Transfer

To transfer an active inbound call with supervision:

1. In the *Call Console*, select the call.
2. Dial the number or contact to transfer the call over to.
3. If the number is busy, either retry or dial another number.
4. Move the mouse over the new, non-selected call and then click **TXR**.

Transfer with Consultation

Calls can be transferred while active, held, or ringing (in).

1. Dial the number or contact to transfer the call over to.
2. When the call is answered, speak to the party.
3. In the *Call Console*, select the call to transfer.
4. Move the mouse over the new call and then click **TXR**.

Transfer to Voice Mail

1. In the *Call Console*, select the call to transfer.
2. In the *Contacts* pane, click a contact with voice mail (in the *Group/Enterprise* or *Favorites* directory) and then click **VM** for that contact.
3. To transfer the call to your own voice mail, select yourself.

Transfer to Queue

1. In the *Call Console*, select the call to transfer.
2. In the *Contacts* pane, expand the *Queues* panel.
3. Click a queue and then click **TXR** for that queue.

Group Call Park

This feature searches within a predefined hunt group for an available line to park a call.

1. In the *Call Console*, click an active or held call and then click **PARK** for that call. The call is parked on an available extension and then removed from the *Call Console*.
2. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

Directed Call Pickup

You can answer a call on behalf of another person.

1. In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory.
2. Click a ringing contact and click **ANS**. The call appears in the *Call Console*.

Start Three-Way Conference

1. If necessary, place calls to participants.
2. In the *Call Console*, select one of the calls to conference.
3. Move the mouse over the non-selected call and then click **CONF**. The calls are moved to the *Conference Call* panel.

Hold Conference

To hold the conference, in the *Conference Call* panel header, click **HOLD**.

Resume Conference

To resume the conference, in the *Conference Call* panel header, click **ANS**.

Hold or Resume Conference Participant

- To place a participant on hold, click HOLD for the target call.
- To resume a participant, click ANS for the target call.

Leave Conference

To leave the conference, click **LEAVE** in the *Conference Call* panel header. The other parties stay connected but the calls are removed from the *Conference Call* panel.

Note that you can only leave a Three-Way conference.

End Conference

To end the conference, click **End** in the *Conference Call* panel header. The calls are terminated and removed from the *Conference Call* panel.

Barge In on Call

1. Click the *Group/Enterprise* or *Favorites* tab.
2. Click a busy contact and then click **BARGE**. A three-way conference is established. *Barge In will not work if a user with a Premium station type enables Barge In Exempt.*

Receive Calls from Queues

To start or stop receiving calls from queues:

1. Click the **Settings** link at the top right-hand corner of the main interface and then click the *Application* tab.
2. In the *Queue Memberships* section, check the *Queue* box for each call center to join.
3. In the *Operator Policies* section, select your *Post Sign-In ACD State* from the drop-down list.

Receptionist Interface

The main elements of the Receptionist interface include:

- Call Console
- Contacts Pane
- Queued Call Pane (Enterprise Edition)
- Setting and Help Links

Call Console

The *Call Console* is where you manage your current calls. It contains the following:

- The main area of the *Call Console* lists your current calls and allows you to perform actions on them.
- **Dialer** - This allows you to make ad hoc calls and redial up to 10 of the most recently dialed numbers.
- **Conference panel** - This lists call legs of your current conference call and allows you to take actions on conference calls.

For each call, the name and the phone number of the remote party (if available), the call state, the duration of the call, and for held calls, the time the call has been on hold, are displayed.

Contacts Pane





You use the *Contacts* pane to call, monitor, and manage your contacts. The pane lists available contact directories.

- **Monitored** - Contacts whose status you are (statically) monitoring, which are configured on the web portal
- **Company** - Contacts in your entire company
- **Personal** - Contacts in your *Personal* directory on BroadWorks
- **Monitored** - Contacts whose status you are (statically) monitoring, which are configured on the web portal
- **Queues** - Your call centers
- **Outlook** - Your Outlook contacts, if the Outlook feature is configured

The *Contacts* pane also contains the **Search** feature, which you use to search for contacts, and the *Directories* panel, which consolidates the contacts from several directories.

Queued Calls Pane

You use the *Queued Calls* pane to manage queued calls in any queue to which you are an active participant. This pane displays calls in selected call centers that you are managing. For each call, the following information is provided:

- Call Status icon, which can be:
 -  Call is waiting to be answered
 -  Message is being played to caller
 -  Call was reordered
 -  Call was bounced
- Name/number of the call center (or Dialed Number Identification Service [DNIS], if applicable)
- Total call time, including the time in the current queue (in parentheses)

Clicking a call expands the call to show additional data:


- Call priority bucket (**Call center**)
- Position of call in queue
- Name and number of the calling party (if available)

Settings and Help Links

- The Settings link, when clicked, displays the *Settings* page, allowing you to configure Receptionist.
- The Services tab under Settings allows you to configure and activate your Call Forwarding Always and Do Not Disturb features.
- The Help link, when clicked, opens the *Hosted Thin Receptionist User Guide* in PDF format.

Managing Contacts

Show Directories

1. At the top right of the *Contacts* pane, click the **arrow**.
2. Then select or unselect the directories to display/hide.
3. To display a directory in the *Directories* panel, select that directory from the drop-down list. To display all directories, select *Show All*.
4. To display a directory below the *Call Console*, click the **Pullout Directory** button  for that directory in the *Directories* panel while the *Show All* option is selected.








Monitor Contacts Statically

The *Favorites* directory displays the phone status of contacts. This is called static monitoring. The *Monitored Contacts* for the receptionist must be configured in the MySite dashboard.


Monitor Contacts Dynamically

In the *Enterprise* directory, click the contact and then click the status icon for that contact to have the contact's state displayed. This is referred to as dynamic monitoring.

Phone States

The possible contact phone states are  Idle,  Busy,  Ringing,  Do Not Disturb,  Private,  Forwarding, and  Unknown.

Search Contacts

1. In the *Search* panel, select the directories to search from the drop-down list.
2. To restrict the search to contacts that start with the text to search for, check the *Begins with* box.
3. In the *Search* text box, enter the text to search for and press ENTER. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results are displayed in the *Search* panel.
4. To clear the search results, click **Reset** .

Note that the search is not case-sensitive.

View Contact Details


Expand the target directory panel and click a contact.

Make Notes about Contact

You can make notes about contacts in the *Group/Enterprise* directory.

1. Expand the *Company Contacts* panel.
2. Click a contact to expand it.
3. Click the **Notes** link for the contact.
4. Enter or modify information in the *Notes for <Contact Name>* dialog box.
5. To save your changes and close the dialog box, click **OK**.
To close the dialog box without saving, click **Cancel**.

Manage Personal Directories


1. In the *Personal Contacts* panel, click **Edit** . The *Edit Personal Contacts* dialog box appears.
2. To add an entry, click **Add**. Enter the name and number in the new row.
3. To delete an entry, select the entry and then click **Delete**.

Note: A *Personal* entry cannot be modified. To edit, delete and Add.

Managing Queues

Display Queued Calls

To monitor calls in queues, you must select the queues to display in the *Queued Calls* pane.

1. In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* menu item.
2. In the dialog box that appears, check the call queues to display to which you are an active participant and then click **Save**.

Retrieve Call from Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call and click **RETRIEVE** for that call. The call appears in the *Call Console* and you treat it as any other call.

Transfer Call to Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel and then select a queued call.
2. In the *Contacts* pane, expand the *Queues* panel.
3. Click a queue and then click **TXR** for that queue. The call is transferred to the bottom of the queue.

Change Position of Call in Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call and then click **REORDER** for that call.
3. From the drop-down list that appears, select a new position.

Note that you cannot place a call ahead of a bounced call.

Transfer Call to Top of Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select *Send to Front*.

Transfer Call to Contact or Ad-Hoc Number

1. In the *Queued Calls* pane, select a queued call.
2. To transfer the call to a contact, click the contact in the *Contacts* pane and then click **TXR** for that contact.
3. To transfer the call to an ad hoc number, enter the number in the *Dialer* and then click **Transfer** in the *Dialer*.